From:	Rellen Hayes
To:	Tucker-Potter, Stacy
Cc:	Hughes, Ernie
Subject:	Directory Project Data Deliverables
Date:	Monday, May 20, 2019 2:00:33 PM
Attachments:	DataDocs_DueBacktoPCI.doc PCI Occupation Codes.xlsx Sample Survey Questions.doc How to Send and Receive Data Via SSH.doc

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Hi Stacy,

Here are the data deliverables we'll need from you so we can start setting up for your directory project. I've pre-filled out the data docs based on what most schools choose. Please review the forms, fill in any missing information and make any necessary changes. Once you've had a chance to review the data requirements, please let me know an ETA for the data file. We are hoping to start your project in July and we will need the data file 3 weeks prior to launch.

- **Data Documents:**
  All data documents are in the attachment 'Data Docs Due Back to PCI'
  - Step 1: Complete the '**Standard Data Fields for Collection and Printing**' (p. 1-5 in attachment 'DataDocs_DueBacktoPCI)
    - Did you select that you would like to use PCI's Occupation Codes or are you unsure if you would prefer to use yours or ours?
      - Attached is 'PCI Occupation Codes'
    - Are you debating on having PCI ask additional survey questions during the update call?
      - Attached is the 'Sample Survey Questions'
  - Step 2: Populate your complete data file based upon selected fields in the document completed during Step 1. Feel free to flag your VIPs (Board of Trustees and top exclusive donors) so they receive a softer outreach touch. Also, remember to include any "Do Not Contact" flags, "Deceased" flags and "Lost Alumni" flags.
  - Step 3: Run some queries on your data file prior to sending to PCI.
    - Complete the '**Record Count Sheet'** on p. 6 in attachment 'DataDocs_DueBacktoPCI'
  - Step 4: How would you prefer data is formatted when sent back to you from PCI?
    - Complete the '**Data Entry Specifications'** document on p. 7 in attachment 'DataDocs_DueBacktoPCI'
  - Step 5: How often and in what format would you like your data returns?
    - Complete the '**Data Return Scheduling and Specifications'** document on p. 8-9 in attachment 'DataDocs_DueBacktoPCI'
  - Step 6: **Transfer Your Data to PCI:**
    - How do you use and prepare an SSH site for a secure data transfer?
      - Use the helpful document and guide 'How to Send and Receive Data Via SSH'
      - Call (757) 965-8231 or email Stephen Newchok at snewchok@publishingconcepts.com to find out the SSH site username and password.

Please don't hesitate to reach out if you have any questions.

Best regards,

Rellen

Rellen Hayes
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Back-to-Back Winner! For two years in a row PCI has been named the "#1 Best Place to Work" in the state of Texas (The Texas Association of Business and the publishers of *Texas Monthly*) and in Dallas-Fort Worth (*Dallas Morning News*). Research shows that a highly engaged workforce drives higher overall client satisfaction.

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